



# RETIREMENT RESOURCE GUIDE

## For Later-Career Faculty and Retired Faculty

**W**hether you are a later-career faculty member gathering information about the retirement process, or a retired faculty member who wants to find out about ways to remain connected to campus, this guide is designed to provide you with a quick overview of the resources available at UC Berkeley.

### EMERITI PRIVILEGES AND BENEFITS

#### Did you know as an emeritus/a you ...

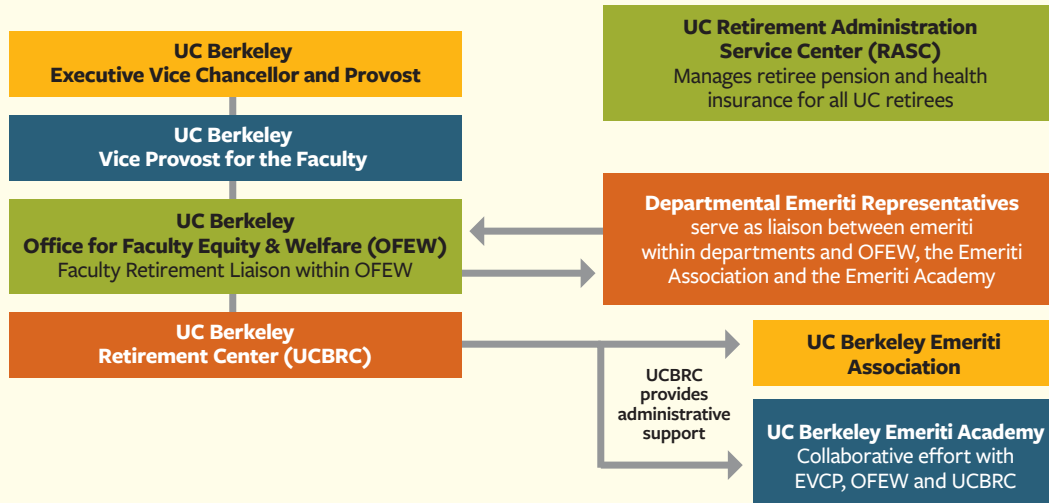
- Continue membership and voting rights in the Academic Senate.
- Have lifetime email and library privileges, and access to software.
- Are eligible to serve on graduate degree committees.
- Continue departmental membership; voting rights vary by department.
- Maintain principal investigator status on grants.
- May use the name of the vacated endowed chair position in your academic title.
- May be recalled or volunteer for teaching, research and service.
- May participate in the Emeriti Research Enabling Grant program.
- Have reduced rates on parking permits, both daily and central campus.
- Are granted automatic membership in the UCB Emeriti Association.
- Are encouraged to join the UCB Emeriti Academy.

For a complete description of all the emeriti privileges and benefits visit [ofew.berkeley.edu/late-career-and-retirement/emeriti-resources](https://ofew.berkeley.edu/late-career-and-retirement/emeriti-resources).



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## UC Berkeley Office for Faculty Equity & Welfare (OFEW)

Associate Vice Provost and [Faculty Retirement Liaison](#) support and provide guidance to faculty on issues of retirement:

- Emeriti representatives serve as a liaison between retired faculty, their departments, and OFEW Associate Vice Provost.
- [List](#) of current Emeriti Representatives.
  - **Administration:** **Vicky Plaut**, Vice Provost for the Faculty
  - **OFEW Website**

## UC Berkeley Retirement Center (UCBRC)

UCBRC supports retirees and those planning to retire from UC Berkeley, Lawrence Berkeley National Lab and UC Office of the President to live well in retirement:

- Fosters lifelong learning through a variety of learning series.
- Provides resources and referrals for pre-retirement and retirement questions.
- Facilitates retirement-related perks and discounts.
  - **Administration:** **Cary Sweeney**, Director, **Camille Koué**, Associate Director, and **Sigrid Mueller**, Program Manager
  - **Retirement Center Website**

## UC Berkeley Emeriti Association (UCBEA)

UCBEA serves as an advocate for emeriti (campus- and systemwide) and provides social engagement opportunities:

- Builds an interdisciplinary community through [lecture-luncheons](#) and other events.
- Administers [small emeriti research enabling grants](#).
- Manages [awards](#) recognizing emeriti's contributions to Berkeley.
- Facilitates the [Emeriti Legacy Project](#) about faculty careers at Berkeley.
- Advocates for its members on issues such as health insurance benefits and the operation of the [Retirement Administration Service Center](#) (RASC).
- All emeriti are automatically members of the Association upon retiring and membership is free.
  - **Administration:** **UCBEA Executive Committee**
  - **Emeriti Association Website**

## UC Berkeley Emeriti Academy

The Academy creates community through interdisciplinary collaborations:

- Supports [interdisciplinary team-teaching](#) and research (e.g., [public discussion panels](#)).
- Facilitates [mentoring opportunities](#) for emeriti.
- Showcases emeriti's work with students through annual events such as the [Emeriti as Mentors Poster Session](#).
- All emeriti are eligible to join the Academy through the completion of a [short enrollment form](#).
  - **Administration:** **Sigrid Mueller**, Program Manager
  - **Emeriti Academy Website** and [short video to learn more](#)

## UC Retirement Administration Service Center (RASC)

The **UC Retirement Administration Service Center (RASC)** is the only office that can officially provide retirement counseling and information on pension and benefits. This is the case for both pre-retirement planning as well as questions regarding retirement benefits. The resources listed on this and the following page provide an overview what is available to UCB faculty. While the Retirement Center cannot provide counseling, we can direct inquiries to the appropriate University resource.

- **UCnet: Step-by-Step Process for Getting Ready to Retire**

The most current and comprehensive information about planning for retirement can be found on the [UCnet website](#) under **Compensation and Benefits**.

- **MyUCRetirement: Educational Resources Related to Retirement Finances**

[MyUCRetirement](#) provides resources to help plan for financial and health care benefits in retirement.

- The **Pathway to Retirement** [webpage](#) lists **comprehensive retirement education events**.

## Pathway Agreement and Faculty Retirement Liaison

The Office of the Vice Provost for the Faculty introduced a UC Berkeley-specific option for faculty who intend to retire called [A Pathway to Retirement Agreement](#):

- This agreement is designed to support ladder-rank faculty with a smooth transition from everyday expectations in research, teaching, and service to an engagement with the university tailored to a faculty member's individual circumstances.
- For more information about this option and other emeriti-related benefits visit the [Late Career and Retirement](#) webpage.
- For a confidential conversation about the pathway agreement process, please contact Faculty Retirement Liaison Sam Davis at [sdavis@berkeley.edu](mailto:sdavis@berkeley.edu).

## Faculty Thriving in Retirement Workshop

This workshop is designed to go beyond the nuts and bolts of retirement and explore the more personal aspects of transitioning to retirement. Topics include:

- How to continue academic interests in retirement.
- Relationships with non-retiring colleagues.
- What this transition may be like for faculty members and their families:
  - Faculty family members/partners are strongly encouraged to attend.
  - Recently retired faculty are welcome to join.
- For the most current workshop schedule, visit the [Faculty Thriving in Retirement](#) event page. Contact the Academy at [emeritiacademy@berkeley.edu](mailto:emeritiacademy@berkeley.edu) for more information.





## Who to Contact About Issues in Retirement

- The UC Berkeley Retirement Center compiled this [comprehensive annotated list](#) of offices on and off campus, which provide support for retirement-related questions and issues.
- The list includes contact information for each office.

## Troubleshooting Pre- or Post-Retirement Issues

- For advice on how to address common pre- or post-retirement issues, visit [Troubleshooting pre/post retirement issues](#).

## UC Retirement Frequently Asked Questions

- The [UC Retirement Frequently Asked Questions-resource](#) is intended to give general guidance, **it does not replace retirement counseling by a [RASC Retirement Counselor](#)**.

## UC Berkeley Perks and Discounts Available to All Retirees

- For more information on the kind of perks and discounts available to all retirees, visit: [retirement.berkeley.edu/retiree\\_id](https://retirement.berkeley.edu/retiree_id)

There are many opportunities for retired faculty to attend lectures and panel discussions organized by the Retirement Center, the Emeriti Association and the Emeriti Academy.

Visit the various programs listed below to learn more about opportunities for engagement.

## Learning in Retirement Program (LIR)

The Learning in Retirement Program Committee, an interdisciplinary team of retired emeriti, designs and organizes the program:

- LIR offers courses in a variety of subject fields, including natural sciences, engineering, social sciences, the humanities and the arts.
- For more information and to register, go to the [Learning in Retirement](#) (LIR) webpage or call 510-642-5461.

## UC Retiree Learning Series

Partnering with Bay Area retirement communities Belmont Village and Front Porch, the series expands lifelong learning opportunities to retirees while providing an opportunity to learn more about Bay Area retirement communities. For more information on the series and how to register, visit the [UC Retiree Learning Series](#) webpage or call 510-642-5461.

## UCB/UCSF Retiree Learning Series

The program features topics of both medical and general interest, building upon the world-renowned expertise of UCSF and UC Berkeley. For more information on the series and how to register, visit the [UCB/UCSF retiree learning series](#) webpage or call 510-642-5461.

The [CenterExpress](#), the Retirement Center's monthly newsletter, lists all upcoming events (send an email to [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu) to be added to the mailing list).



## Support for Undergraduates with Navigating Berkeley

UC Berkeley can be intimidating and challenging for undergraduate students to navigate. Each semester, the Emeriti Academy hosts panels on demystifying office hours and demystifying research. The panels on **Demystifying Office Hours: Advice from Faculty** aim at reducing barriers for undergraduate students to sign up for office hours with their professors. After each panel, students can request a one-time, one-on-one coaching session with an emeritus/a in their academic field of choice. We need emeriti volunteers to serve as a coach. Please contact the Emeriti Academy at [emeritiacademy@berkeley.edu](mailto:emeritiacademy@berkeley.edu), if you're willing and available to volunteer.

Programs such as the **Undergraduate Research Apprentice Program (URAP)** or the Rausser College for Natural Resources's **Sponsored Projects for Undergraduate Research (SPUR)** are two examples of many other Berkeley programs where undergraduate students participate in research projects. Visit the [Berkeley research website](#) for a list of similar programs. For more information on URAP, email [urap@berkeley.edu](mailto:urap@berkeley.edu). For more information on SPUR, email [spur@berkeley.edu](mailto:spur@berkeley.edu).

**Freshman and Sophomore Seminars (FSSP)** emphasize interaction and discussion, providing a counterpoint to the learning experience in Berkeley's large lecture classes. These seminars offer students an unprecedented opportunity to explore a wide range of majors and even fields of study usually reserved for graduate students. For more information, email [fssp@berkeley.edu](mailto:fssp@berkeley.edu).



## Office for Faculty Equity and Welfare

200 California Hall, MC #1500

Berkeley, CA 94720-1500

**Phone:** 510-642-1935

**Email:** [ofew@berkeley.edu](mailto:ofew@berkeley.edu)

## UC Berkeley Retirement Center

1995 University Ave., Suite 401

Berkeley, CA 94704-1550

**Phone:** 510-642-5461

**Email:** [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu)

### In-Person Office Hours:

You can drop by the **Retirement Center** on **Wednesdays between 10:30 am and 12:30 pm** and on **Thursdays between 9:30 and 11:30 am**.

## UC Berkeley Emeriti Association

**Email:** [ucbea@berkeley.edu](mailto:ucbea@berkeley.edu)

## UC Berkeley Emeriti Academy

**Phone:** 510-642-5461

**Email:** [emeritiacademy@berkeley.edu](mailto:emeritiacademy@berkeley.edu)

## How to Keep in Touch

### CenterExpress Newsletter for all retirees

- Includes announcements for lectures, programs and other important retirement-related information.
- Send an email to [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu) to be added to the mailing list.

### UCB Emeriti Association email list

- All emeriti are automatically a member of the Association and are added to the Association's listserv for announcements about lectures and items related to emeriti advocacy.
- Email [ucbrc@berkeley.edu](mailto:ucbrc@berkeley.edu) if you'd like your personal email added.

### UCB Emeriti Academy email list

- Members of the Emeriti Academy receive notices about Academy events and teaching and mentoring opportunities.
- All emeriti are eligible to join the Academy by completing a [short enrollment form](#).

### Connect with Your Department about Emeriti Issues

- Contact your Department Emeriti Representative:
  - Click on this [link](#) for a list of current Emeriti Reps



# Survey of UC Berkeley Emeriti Activities 2018-21

## ACTIVITIES ON CAMPUS

Reported by 317 survey respondents

### SERVICE

42%

Reported offering  
service to campus  
departments

### MENTORING

70%

Reported serving in an informal  
and/or formal mentoring role

### TEACHING

21%

Reported continuing  
to teach graduate and  
undergraduate courses

## SCHOLARLY WORKS

Reported by 287 survey respondents



68%

Reported publishing  
one or more  
journal articles



35%

Reported publishing  
one or more  
books



## RESEARCH FUNDING & DONATIONS

Of all Emeriti over 3-year fiscal cycle

**\$ 94.7 M**

New and ongoing  
research generated by  
Emeriti PIs



**\$ 106 M**

Total gifts made by  
Emeriti to UCB

A full summary of the UCB report can be found here:  
[retirement.berkeley.edu/ucbea](https://retirement.berkeley.edu/ucbea)